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Paul Tangen

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EXAMINER

TRAN, QUOC A

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PAPER

Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Office Action Summary	Application No. 10/692,525	Applicant(s) TANGEN ET AL.	
	Examiner Quoc A. Tran	Art Unit 2176	

-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --

Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133).

Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

Status

1) ☒ Responsive to communication(s) filed on 08 April 2008.

2a) ☒ This action is **FINAL**. 2b) ☐ This action is non-final.

3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

4) ☒ Claim(s) 1; 3-18; 20-23 & 25-42 is/are pending in the application.

 4a) Of the above claim(s) _____ is/are withdrawn from consideration.

5) ☐ Claim(s) _____ is/are allowed.

6) ☒ Claim(s) 1; 3-18; 20-23 & 25-42 is/are rejected.

7) ☐ Claim(s) _____ is/are objected to.

8) ☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

9) ☐ The specification is objected to by the Examiner.

10) ☒ The drawing(s) filed on 08 April 2008 is/are: a) ☒ accepted or b) ☐ objected to by the Examiner.

Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).

Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).

11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).

a) ☐ All b) ☐ Some * c) ☐ None of:

1. ☐ Certified copies of the priority documents have been received.
2. ☐ Certified copies of the priority documents have been received in Application No. _____.
3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

* See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

1) ☐ Notice of References Cited (PTO-892)

2) ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)

3) ☐ Information Disclosure Statement(s) (PTO/SB/08)
 Paper No(s)/Mail Date _____.

4) ☐ Interview Summary (PTO-413)
 Paper No(s)/Mail Date _____.

5) ☐ Notice of Informal Patent Application

6) ☐ Other: _____.

DETAILED ACTION

This is a **Final** rejection in response to amendments/remarks filed on 04/08/2008. Claims 1, 3-18, 20-23, and 25-42 are pending. Claims 1, 18, and 23 are independence claims. Applicants have amended claims 1, 13, 18, 23. Effective filing date is **10/24/2003** (Hyperion Solutions Corporation).

Claims Rejections – 35 U.S.C. 101

35 U.S.C. 101 reads as follows:

Whoever invents or discovers any new and useful process, machine, manufacture, or composition of matter, or any new and useful improvement thereof, may obtain a patent therefor, subject to the conditions and requirements of this title.

Claims 18, 20-23, 25-39, and 41-42 are rejected under 35 U.S.C. 101, because the claimed invention is directed to non-statutory subject matter.

Claims 18, 20-23, 25-39, and 41-42:

Claims 18, and 23 recites an “*apparatus*” comprising the “*means for*” for performing various functions (i.e. reading, determining...). The disclosure of the present invention expressly states “an *apparatus for establishing a mapping* between internal metadata and external data in a report design environment ...” (emphasis added -- see Specification → Page 15, Para 28). Also “adding an additional *software package to generate such mappings*” (emphasis added -- see Specification → Page 3, Para 3). Thus, for purposes of examination, the examiner interprets the recited “*means for*” for performing various functions (i.e. reading, determining...) to comprise

only computer software. Accordingly, the “*apparatus*” recited in Claims 18, and 23 are software *per se*.

Computer software is not a process, a machine, a manufacture or a composition of matter. Accordingly, Claim 17 fails to recite statutory subject matter, as defined in 35 U.S.C. 101.

Claims 20-22, 25-39, and 41-42 merely further describe the recited “*means for*” for performing various functions (i.e. reading, determining...)” Accordingly, Claims 20-22, 25-39, and 41-42 fail to recite statutory subject matter, as defined in 35 U.S.C. 101.

In the interest of compact prosecution, the application is further examined against the prior art, as stated below, upon the assumption that the applicants may overcome the above stated rejections under 35 U.S.C. 101.

Claim Rejections - 35 USC § 103

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

Claims 1, 3-18, 20-23, and 25-42 rejected under 35 U.S.C. 103(a) as being unpatentable over **Davis** et al (U.S. Pub No. 2003/0041077, filed 01/23/2002)

[hereinafter "Davis"], in view of Davis et al (U.S. Patent No. 6,920,608, filed 05/18/2000)
[hereinafter "Davis'608"],

Regarding independent claim 1,

Davis teaches:

A method for establishing a mapping between internal metadata and external metadata,

(See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be

valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

the method comprising: reading, from a database, said internal metadata; wherein said internal metadata is metadata that describes data, contained in the database;

(See Davis at Para 59, the conduit 104 may include any communications mechanism (e.g., an internal memory copy, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

generating and displaying a screen, wherein displaying the screen includes displaying organizing the internal metadata, which was read from the database, in a grid having rows and columns,

(See Davis at Para 67, discloses the RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc;

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 98, discloses XML document, a RDX style sheet editor (not shown) acts as a report-writer: the user can graphically compose a report from a sample document, specify the XBRL instance documents that the report can apply and automatically create a style document.)

**receiving from said user said definition of external metadata, wherein
said definition of external metadata describes describing all data points
within said selection; and creating a mapping between said selected
internal metadata and said defined external metadata**

(See Davis at Para 89-90, discloses RDX system supplements the DTD validation with optional semantic validation based on user-defined rules. For example, a user may define a rule that validates totals with related subtotals to assure the subtotals equal the total. If, however, the XBRL rules are satisfied and there are user-defined rules, RDX parser 204 interprets the XBRL document, by applying the user-defined rules, and then builds the NDOM.

Also See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4).

**presenting to the user one or more user interface controls for
receiving, from said user,**

(See Davis Fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language". Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. Also Davis further discloses RDL tagger 212 supports translation of XBRL (external metadata- See Item 340 at Fig. 3) instance document data into RDL format for analysis in RDL system 106. The RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents.

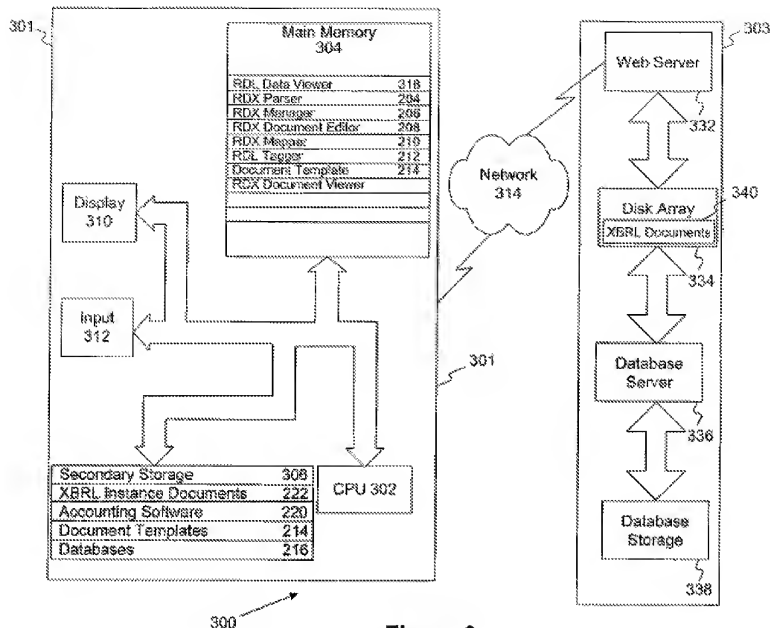


Figure 3

wherein the definition of external metadata is for only said subset of internal metadata that corresponds to cells that were selected by said selection; wherein the definition of external metadata specifies particular external metadata to associate with said subset of internal metadata: wherein the definition of external metadata describes all data points within said selection;

(See Para 87-90→ Davis discloses this limitation in that FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data

files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents.)

receiving, via the one or more user interface controls, said definition of external metadata; and creating a mapping between said selected internal metadata and said defined the particular external metadata.

(See Para 87-90→ Davis discloses this limitation in that RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents- See Davis at Para 67. See also Davis at Fig. 2 item 210, the RDX mapper.)

In addition Davis does not expressly teach, but Davis'608 teaches:

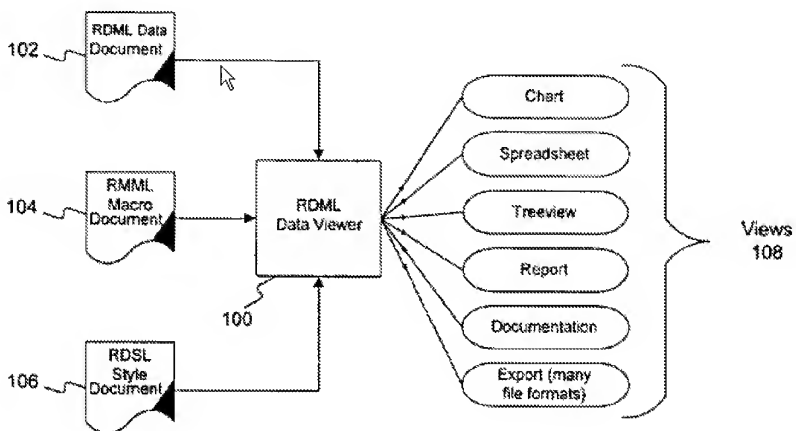
wherein dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings; in response to

receiving from said user said selection: determining which internal metadata, displayed on said grid, corresponds to said one or more cells; wherein the internal metadata that corresponds to the one or more cells is a subset of all internal metadata displayed in said grid;

(See Davis'608 at Col. 9, Lines 5-55, discloses "line items that is similar to a "record" or "row" in a relational database. In RDML, the line item is generally the basic unit of calculation, as opposed to a single data value or cell as is typical with most conventional databases or spreadsheets in relational databases, and documentation ("metadata") regarding the "line item sets." wherein the RDML(i.e. RDL) data document 102 is read by the RDML data viewer 100 which stores the data internally, making it available to a number of "views" 108, which present the data in different ways (charts, tables, etc.) to a user). Also see Davis'608 at Fig. 14F and Col. 46, Lines 1-60→ discloses a line item have a visual link associated with it that can be activated by a user and further discloses the uses of XML editors directly read from Internet data using URL 1602 that is excepting formula, Xpointer, and Xlink to specific destination of a link to read in data from remote RDML document 102, this allows data to be incorporated into a single spreadsheet- It is reasonably to interpret as dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings as claimed.

receiving from a user a selection of a portion of said grid, said selection indicating one or more cells of the grid;

(See Davis'608 at Fig. 1 and Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)



Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of said dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings; in response to receiving from said user said selection: determining which internal metadata, displayed on said grid, corresponds to said one or more cells; wherein the internal metadata that corresponds to the one or more cells is a subset of all internal metadata displayed in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of

automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **independent claim 18**,*

is directed to an apparatus for performing the steps of claim 1 cites above.

Thus, Davis and Davis'608 disclose every limitation of Claim 18 and provides proper reasons to combine, as indicated in the above rejections for Claim 1- see Davis at Para 68, discloses various System Hardware Component

*Regarding **independent claim 23**,*

is directed to an apparatus for performing the steps of claim 1 cites above.

Thus, Davis and Davis'608 disclose every limitation of Claim 23 and provides proper reasons to combine, as indicated in the above rejections for Claim 1- see Davis at Para 68, discloses various System Hardware Component.

*Regarding **claims 3 and 25**,*

Davis teaches:

said receiving from said user a definition of external metadata comprises: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list.

(See Para 87-90→ Davis discloses this limitation in that FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis at para 47 discloses XBRL taxonomy creation, which is typically a complex process resulting in the creation of an XML document (metadata) with a very explicit, highly technical format, is experienced by the user as the creation of a simple set of definitions grouped by subject (i.e. predefined metadata from said list).

In addition Davis'608 teaches:

determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined,

(See Davis'608 at Col. 45, Line 60→Col.46, Line 55, discloses the data view 100 may also set macro to be executed automatically as the selected line items are changed (is reasonably interprets as selection is predefined as claimed). Also Davis'608 further discloses at Fig. 14F and Col, 46, Lines 1-60→ a line item have a visual link associated with it that can be activated by a user and further discloses the uses of XML editors directly read from Internet data using URL 1602 that is excepting formula, Xpointer, and

Xlink to specific destination of a link to read in data from remote RDML document 102, this allows data to be incorporated into a single spreadsheet-

Accordingly, It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of said determining if the external metadata describing all data points within said selection is predefined; and wherein if the external metadata describing all data points within said selection is predefined as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 4 and 26**, Davis teaches:*

wherein said list is provided in a tree control.

(See Davis at Para 62, discloses a NDOM form a tree structure.)

*Regarding **claim 5 and 27**, Davis teaches:*

determining if syntax of the external metadata describing all data points within said selection is predefined;

(See Davis at Para 40, discloses a diagram illustrating interaction between the RDX document editor, RDX mapper, and the document templates;

said receiving from said user a definition of external metadata comprises: presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and receiving from said user a specification of external metadata to be created.

(See Para 87-90→ Davis discloses this limitation in that FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules.

and wherein if the external metadata describing all data points within said selection is not predefined,

(See Para 87-90→ Davis discloses this limitation in that FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from

Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules (not predefined).

In addition Davis'208 teaches:

but syntax of the external metadata describing all data points within said selection is predefined,

(See Davis'608 at Col. 45, Line 60→Col.46, Line 55, discloses the data view 100 may also set macro to be executed automatically as the selected line items are changed (is reasonably interprets as selection is predefined as claimed).

Accordingly, It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of said syntax of the external metadata describing all data points within said selection is predefined as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 6-7 and 28-29,***

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Davis'608 disclose every limitation of Claims 6-7 and 28-29 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition, Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

*Regarding **claims 8 and 30,***

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Davis'608 disclose every limitation of Claims 8 and 30 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition, Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

*Regarding **claims 9 and 31,***

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Davis'608 disclose every limitation of Claims 9 and 31 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition Davis teaches:

wherein said presenting includes presenting said user with a dialog box.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

*Regarding **claims 10 and 32,***

are fully incorporated similar subject of claims 1 and 4 cite above, and are similarly rejected along the same rationale. Thus, Davis and Davis'608 disclose

every limitation of Claims 10 and 32 and provide proper reasons to combine, as indicated in the above rejections for Claims 1 and 4.

In addition, Davis teaches:

an element button is selected and a text field when a custom button is selected.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

Regarding claims 11 and 33,

Davis'608 teaches:

wherein said selection is one or more columns in said grid.

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an

XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 12 and 34,***

Davis'608 teaches:

wherein said selection is one or more columns in said grid.

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 13 and 35,***

Davis'608 teaches:

selecting individual cells in said grid.

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 14 and 36,***

Davis'608 teaches:

receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is

one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 15 and 37,***

Davis'608 teaches:

receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include a means of receiving from said user a selection of is one or more columns in said grid as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of

automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

*Regarding **claims 16 and 38**,*

Davis teaches:

**external metadata is Extensible Business Reporting Language
(XBRL) metadata;**

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report.)

*Regarding **claims 17 and 39**,*

are fully incorporated similar subject of claim 1 cites above, and are similarly rejected along the same rationale. Thus, Davis and Davis'608 disclose every limitation of Claims 17 and 39 and provide proper reasons to combine, as indicated in the above rejections for Claim 1.

In addition, Davis teaches:

. **schema manager-** (See Davis at Para 82, discloses XBRL Schema management.)

Regarding **Claim 20**,

Davis teaches:

a predefined external metadata selection determiner coupled to said external metadata user definition receiver;

(See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

**and wherein said external metadata user definition receiver includes:
a predefine metadata list presenter; and a predefined metadata list item
receiver coupled to said predefined metadata list presenter.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

Also See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

Regarding **Claim 21**,

Davis teaches:

a predefined external metadata syntax determiner coupled to said external metadata user definition receiver; and wherein said metadata dialog box presenter; and an external metadata specification receiver coupled to said external metadata dialog box presenter.

(See Davis at Para 27, discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report.

Also see Davis at Para 59, discloses RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk).

Also see Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be

valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Page 3 Para 4)

*Regarding **Claim 22**,*

Davis teaches:

a user formula receiver; a new row or column creator coupled to said user formula receiver and to said internal metadata grid organizer; a new row or column user formula placer coupled to said new row or column creator and to said user formula receiver.

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language". Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.

Also see Davis at Para 110, discloses pointers reference information in a variety of accessible locations (e.g., in files, spreadsheets, other XBRL documents, relational databases, non-relational databases (e.g., object-based databases), accounting software packages, and URL's). Such information can be either local or web-based)

*Regarding **Claims 40-42**,*

Davis teaches:

the internal metadata describes data, contained in the database, from which a report is to be generated;

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906.)

Also see Davis at Para 110, discloses pointers reference information in a variety of accessible locations (e.g., in files, spreadsheets, other XBRL documents, relational databases, non-relational databases (e.g., object-based databases), accounting software packages, and URL's). Such information can be either local or web-based).

In addition Davis does not expressly teach, but Davis'608 teaches:

and the screen includes tools for designing the report.

(See Davis'608 at Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view, and a graphical user interface, and . Also Davis'608 further discloses a graphical tool used by the user to create an RDML document 102, See Davis' 608 at Col. 15, Lines 10-25,)

It would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis to include the screen includes tools for designing the report as taught by Davis'608. One of ordinary skill in the art would have been motivated to modify this combination to archive a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and

automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24.

It is noted that any citations to specific, pages, columns, lines, or figures in the prior art references and any interpretation of the references should not be considered to be limiting in any way. A reference is relevant for all it contains and may be relied upon for all that it would have reasonably suggested to one having ordinary skill in the art. See, MPEP 2123.

Response to Arguments

Brief description of cited prior art:

Davis [hereinafter Davis] discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report (Para 27) which represented in a "Tree View for Reusable Data Markup Language" (Fig. 9 and Para 104) wherein RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across the Internet, or a fetch from a storage device such as a hard disk) (Para 59). Davis further discloses XBRL is an XML-based language used for

reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Para 23 and Para 4). Also Davis discloses in FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

Davis [hereinafter Davis'608] discloses a method and system a "chart view" for a markup language referred to as Reusable Data Markup Language ("RDML") includes Graphical User Interface and HTML browser that permits the browsing and manipulation of numbers and provide a related data viewer that acts as a combination Web browser

and spreadsheet/analytic application that may automatically read numbers from multiple online sources and manipulate them without human intervention. Using the markup language, users may browse online sources using numerical-based queries, and the data viewer may automatically combine and manipulate multiple documents on a single display- See Col. 3 Lines 55-65.

Response to Applicant's Arguments:

Beginning on page 11/18 of the Remarks (hereinafter the remarks), Applicant argues the following issues, which are accordingly addressed below.

Rejection of Claims 18, 20-23, 25-39 and 41-42 under 35 U.S.C. § 101:

Applicant argues, that claims 18, 20-23, 25-39 and 41-42 rejection under 35 U.S.C. § 101 is not proper, because "*one skilled in the art would understand that hardware components of the apparatus may utilize "an additional software package" to fulfill the function of "generating such mappings."* and the various "*means*" recited in the claimed "*may be implemented using various types of operating systems, computing platforms, computer programs, and/or general purpose machines.*" Thus the specification explicitly recites a non-software means for performing the various functions of the Claims" -see the remarks Page 11→ Page 12 Para No.1.

The examiner disagrees.

As discussed in the rejection above, Claims 18, 20-23, 25-39, and 41-42 are rejected under 35 U.S.C. 101 because the claimed invention is directed to non-statutory subject matter such as [Computer software], which is not a process, a machine, a manufacture or a composition of matter, as defined in 35 U.S.C. 101.

It is noted the disclosure of the present invention expressly states "*an apparatus for establishing a mapping between internal metadata and external data in a report design environment...*" (Emphasis added -- see Specification → Page 15, Fig. 15 and Para 28). Also "*adding an additional software package to generate such mappings*" (emphasis added -- see Specification → Page 3, Para 3). It is noted that the rejected claims do not expressly recite any hardware component of the claimed "apparatus." Additionally, as pointed out by Applicant, the various "*means*" recited in the rejected claims "*may be implemented using various types of operating systems, computing platforms, computer programs, and/or general purpose machines*" (emphasis added). Thus, the recited "means" may comprise only "computer programs." Additionally, there is no hardware illustrated as an apparatus in the original Fig. 15 (see applicant's drawing Fig.15 'apparatus').

Thus, the examiner interprets the recited "*apparatus*" and the various "*means for*" for performing various functions (i.e. reading, determining...) to comprise only computer software recited in claims 18, 20-23, 25-39 and 41-42. Accordingly, the recited "apparatus" is software *per se*.

Computer software is not a process, a machine, a manufacture or a composition of matter. Accordingly, Claims 18, 20-23, 25-39 and 41-42 fails to recite statutory subject matter, as defined in 35 U.S.C. 101.

If the examiner has overlooked the portion of the original disclosure that ***expressly describes*** the recited "apparatus" as necessarily comprising a computer hardware component, then Applicant should specifically point it out (by page number and line number) in the response to this Office Action.

Rejection of Claims 1; 3-18, 20-23, and 25-42 under 35 U.S.C. § 103(a) over Davis and Davis'608:

Firstly: Applicant argues, the combination of Davis and Davis'608 fail to teach "*a definition of external metadata,*" because Davis'608 'DTD' is not *a definition of external metadata*" as claimed- see the remarks page 14 item (1).

The examiner disagrees.

For purposes of responding to Applicant's argument, the examiner will assume that Applicant is arguing for the patentability of Claim 1.

As discuss in the rejection above, specifically ***Davis*** discloses in FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server

externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

In addition, **Davis'608** discloses an RDML document 102 may be an ASCII/UNICODE text file used to transmit data and metadata to the *[RDML Data Viewer 100]*. It *[can be stored locally, or can be transmitted over network 214 such as a corporate LAN or the Internet (using HTTP, FTP, email, etc.)]*. To be a valid RDML document 102, *the file conforms to the RDML Document Type Definition ("DTD")* see Davis'608 at Col. 15, lines 50-60.

Therefore, Davis and Davis'608 clearly teach "*a definition of external metadata,*" as claimed.

Secondly: Applicant argues, the combination of Davis and Davis'608 fail to teach "*presenting to the user one or more user interface controls for receiving, from said user, a definition of external metadata*" because Davis'608 does not teach "*a definition of external metadata*" as claimed- see the remarks pages 14-15 item (2).

The examiner disagrees.

For purposes of responding to Applicant's argument, the examiner will assume that Applicant is arguing for the patentability of Claim 1.

As discuss in the rejection above, specifically **Davis** discloses in FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

In addition, **Davis'608** discloses an RDML document 102 may be an ASCII/UNICODE text file used to transmit data and metadata to the [RDML Data Viewer 100]. It [can be stored locally, or can be transmitted over network 214 such as a corporate LAN or the Internet (using HTTP, FTP, email, etc.)]. To be a valid RDML document 102, the file conforms to the RDML Document Type Definition ("DTD") see

Davis'608 at Col. 15, lines 50-60.

Also Davis'608 further reference to Fig. 1, which illustrated several of the components: RDML (item 102), RDSL (item 106), RMML (item 104) and RDML data viewers (chart spreadsheet (in a flat file format - rows and columns), treeview, report, etc- Also in Fig. 10 and at Col. 26. Lines 20-55, discloses item 102 may be from external metadata source.

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis with Davis's to produce a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24, and the XBRL document tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

Therefore, Davis and Davis'608 clearly teach operating the server to determine whether to fulfill the request by comparing owner preferences for the media

representation of the matching one of the media objects with the user preferences for using media representations as claimed and provide proper reasons to combine under 35 U.S.C. § 103(a).

Third: Applicant argues, the combination of Davis and Davis'608 fail to teach " *"receiving... the definition of external metadata" occurs "via... user interface controls" displayed "in response" to receiving a selection in a grid."* because the office action is inconsistent of the teaching of *"definition of the external metadata"* - see the remarks pages 15-16 item (3).

The examiner disagrees.

For purposes of responding to Applicant's argument, the examiner will assume that Applicant is arguing for the patentability of Claim 1.

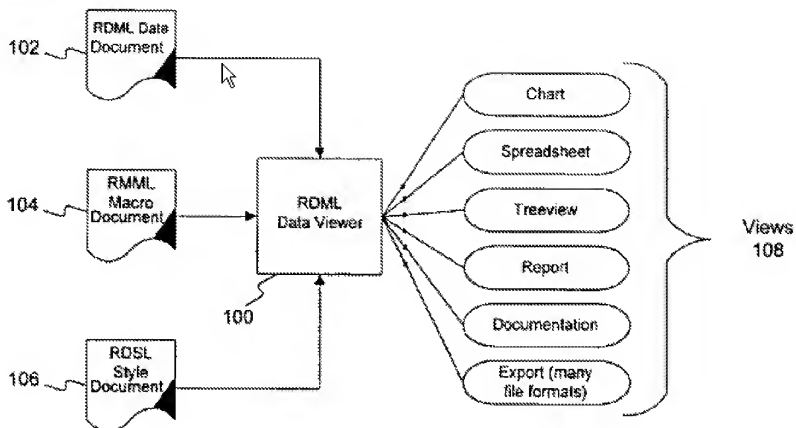
As discuss in the rejection above, specifically **Davis** discloses in FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of

XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

In addition, **Davis'608** discloses an RDML document 102 may be an ASCII/UNICODE text file used to transmit data and metadata to the *[RDML Data Viewer 100]*. It *[can be stored locally, or can be transmitted over network 214 such as a corporate LAN or the Internet (using HTTP, FTP, email, etc.)]*. To be a valid RDML document 102, *the file conforms to the RDML Document Type Definition ("DTD")* see Davis'608 at Col. 15, lines 50-60.

Also Davis'608 further reference to Fig. 1, which illustrated several of the components: RDML (item 102), RDSL (item 106), RMML (item 104) and RDML data viewers (chart spreadsheet (in a flat file format - rows and columns), treeview, and report, etc- Also in Fig. 10 and at Col. 26. Lines 20-55, discloses item 102 may be from external metadata source.

See Also Davis'608 at Fig. 1 and Col. 8, Lines 10-20, discloses internal data viewer architecture, which includes spreadsheet view and a graphical user interface.



And Davis'608 at Col. 9, Lines 5-55, discloses "line items that is similar to a "record" or "row" in a relational database. In RDML, the line item is generally the basic unit of calculation, as opposed to a single data value or cell as is typical with most conventional databases or spreadsheets in relational databases, and documentation ("metadata") regarding the "line item sets." wherein the RDML(i.e. RDL) data document 102 is read by the RDML data viewer 100 which stores the data internally, making it available to a number of "views" 108, which present the data in different ways (charts, tables, etc.) to a user). Also see Davis'608 at Fig. 14F and Col, 46, Lines 1-60→ discloses a line item have a visual link associated with it that can be activated by a user and further discloses the uses of XML editors directly read from Internet data using URL 1602 that is excepting formula, Xpointer, and Xlink to specific destination of a link to read in data from remote RDML document 102, this allows data to be incorporated into

a single spreadsheet- It is reasonably to interpret as dimensional metadata from said internal metadata is placed in the grid as row headings and/or column headings as claimed.

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis with Davis's to produce a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document- See Davis at Para 24, and the XBRL document tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

Therefore, Davis and Davis'608 clearly teach receiving... the definition of external metadata occurs via... user interface controls displayed in response to receiving a selection in a grid as claimed and provide proper reasons to combine under 35 U.S.C. § 103(a).

Accordingly, for at least all the above evidence claims 1; 3-18, 20-23, and 25-42 remain rejected.

Conclusion

Accordingly **THIS ACTION IS MADE FINAL** See MPEP § 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

A shortened statutory period for reply to this final action is set to expire THREE MONTHS from the mailing date of this action. In the event a first reply is filed within TWO MONTHS of the mailing date of this final action and the advisory action is not mailed until after the end of the THREE-MONTH shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the date of this final action.

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Quoc A. Tran whose telephone number is 571-272-8664. The examiner can normally be reached on Mon through Fri 8AM - 5PM.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Doug Hutton can be reached on (571)272-4137. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free).

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